



Maricopa County LWIA Labor Market Information

Introduction Summary

The Arizona Office of Economic Opportunity (OEO) produces demographic, labor force, regulatory, workforce, and economic information for Arizona and substate areas. OEO created the following summary of economic highlights for Maricopa County.

- Maricopa County experienced positive population growth between 2010 and 2017. Over this period, Maricopa County's population increased by 489,672 individuals.
- The population in Maricopa County is projected to continue growing into future at a rate of almost 2% per year.
- Arizona's population over the age of 65 is growing much faster than other age cohorts, but this growth rate is expected to decline starting in 2020.
- Maricopa County has a higher median income and a higher labor force participation rate than the rest of Arizona.
- Educational attainment in Maricopa County is similar to educational attainment in Arizona and the United States.
- Unemployment tends to decrease with higher educational attainment. Maricopa County's unemployment rate for individuals with a Bachelor's Degree or higher is 2.5% while residents who did not complete high school have a 5.6% unemployment rate.
- Public assistance programs are utilized by Maricopa County residents at roughly the same rate as the United States.
- Sources of health insurance for Maricopa County residents mirror the trends in all of Arizona.
- The unemployment rate in Maricopa County tends to hover below Arizona's unemployment rate.
- From 2001-2017, the composition of the economy changed. Education and Health Services; Leisure and Hospitality; and Financial Activities gained shares. Manufacturing; Mining and Construction; and Government lost shares.
- Maricopa County is projected to experience significant job growth in many different industries.

This section summarizes labor market and workforce trends occurring within the Maricopa County economy to help address and manage future workforce challenges.



Economic Overview

Maricopa County

How to use data:

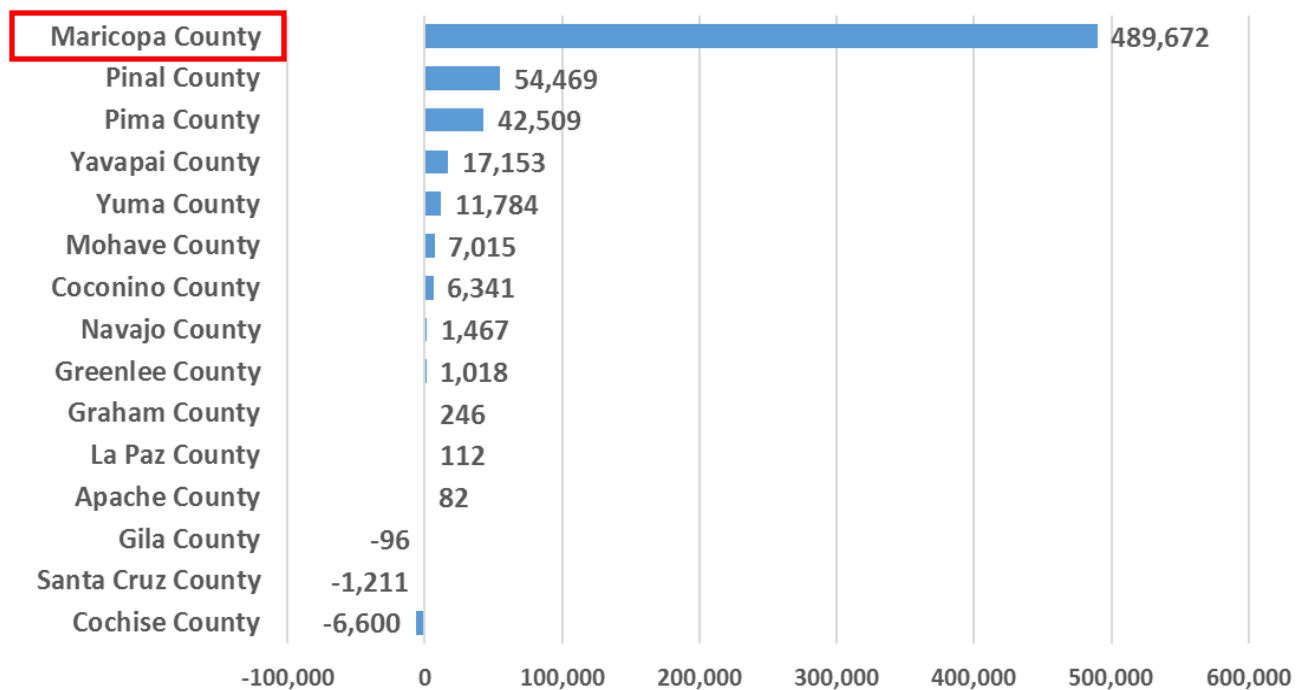
- Use data to drive decision, not validate decisions
- Use more than one source of data** – don't lock yourself into a single estimate, consider all of the available data to get the most accurate picture
- Know the limitations of your data set** – it's easy to accidentally misuse data and draw erroneous conclusions
- Become familiar with different data sets (or someone who is)** – there is no one place to find all the data you need

Immerse yourself in the data

Be prepared to accept surprising surprises



Population Growth by County (2010-2017):



Source: Produced by the Arizona Office of Economic Opportunity using 2017 Population Estimates (PEPTCOMP) in cooperation with the US Census Bureau

Maricopa, Pima, and Pinal Counties represented 94% of total population growth within the state; however, these counties are also the most populous. Maricopa County has recorded the most population growth of any county in Arizona.



Maricopa County Population Projections 2015 Medium Series

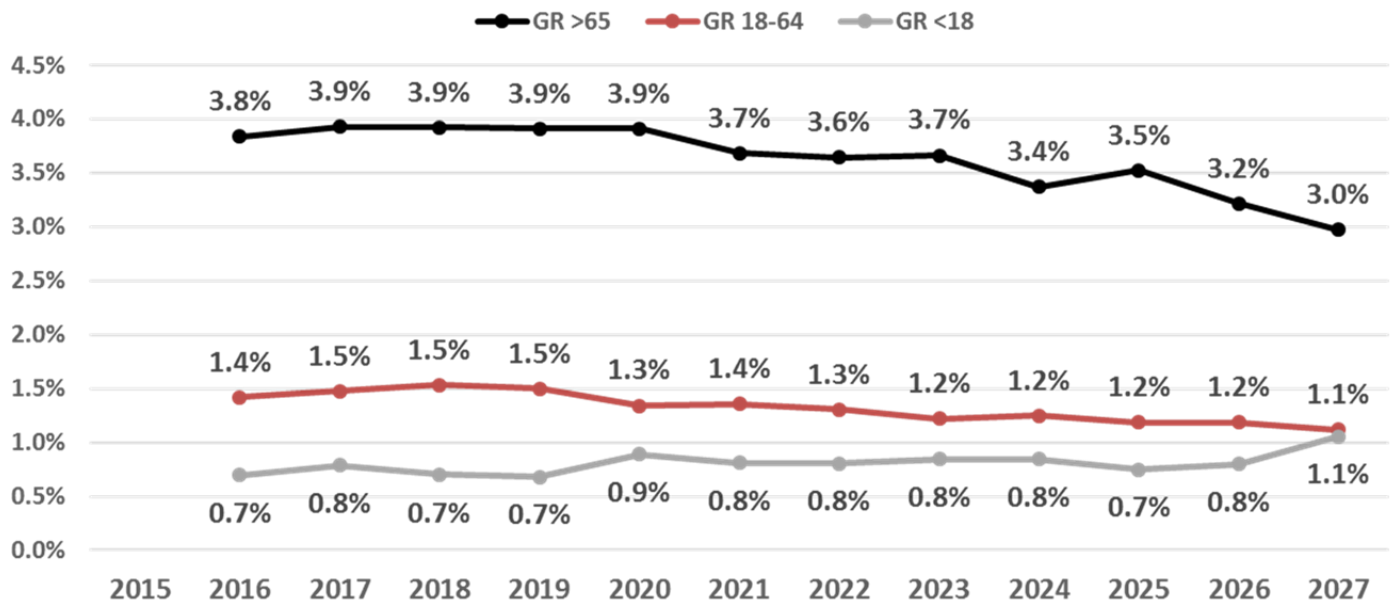
Year	Population	Population Change	Population % Change	Natural Change (Births-Deaths)	Total Net Migration (Inflows-Outflows)
2017	4,233,286	80,479	1.9%	28,208	51,637
2018	4,315,627	82,341	1.9%	28,369	53,311
2019	4,398,430	82,803	1.9%	28,552	53,562
2020	4,480,899	82,470	1.9%	28,665	53,086
2021	4,562,670	81,770	1.8%	28,773	52,247
Source: Office of Economic Opportunity 2015-2050 Population Projections, Medium Series					

Maricopa County is projected to have steady, significant growth until the end of the projection period in 2050. Roughly one third of this population growth will be created by natural change (number of births exceeding the number of deaths). Roughly two thirds of this population growth will be created by net migration (number of individuals moving to Maricopa County exceeding the number of individuals moving away from Maricopa County).



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Arizona Population Growth Rate by Age Category, 2016-2027



Source: Arizona Office of Economic Opportunity 2015-2050 Population Projections, Medium Series

Chart note: data is for the whole state of Arizona

The 65+ population is projected to grow at nearly 2-3 times the rate of the 18-64 age group and 3-4 times the rate of the 17 and under age group. The growth rate of the 65+ cohort will steadily decline over the next decade. The 18-64 cohort will experience slower declines in their growth rate over the next decade. The 17 and under cohort will see modest increases in growth rates during the same period.



Population Characteristics (2017)

Indicator	Maricopa County	Arizona	United States
Median Household Income	\$62,223	\$56,581	\$60,336
Median Age	36.4	37.7	38.1
Individuals with a Disability between 18-64	11.2%	10.5%	10.3%
Veterans	7.5%	9.0%	7.3%
Poverty Status	13.4%	14.9%	13.4%
Mean Travel Time to Work (minutes)	26:24	25:36	26:54
Civilian Labor Force Participation Rate	64.2%	59.6%	62.8%
Population over 16	3,383,598	5,571,583	260,564,248
Source: Produced by the Arizona Office of Economic Opportunity using 2017 ACS 1-Year Estimates (DP03, B01002, S1810, S2101) in cooperation with the US Census Bureau			

- Maricopa County has a higher median household income than the United States.
 - A majority of the Arizona population over the age of 16 resides in Maricopa County.
 - Maricopa County has a higher rate of working age adults with a disability compared to the United States.
- These individual items can help guide workforce development initiatives.



Highest Educational Level Achieved (Population over 25 years of age; 2017)

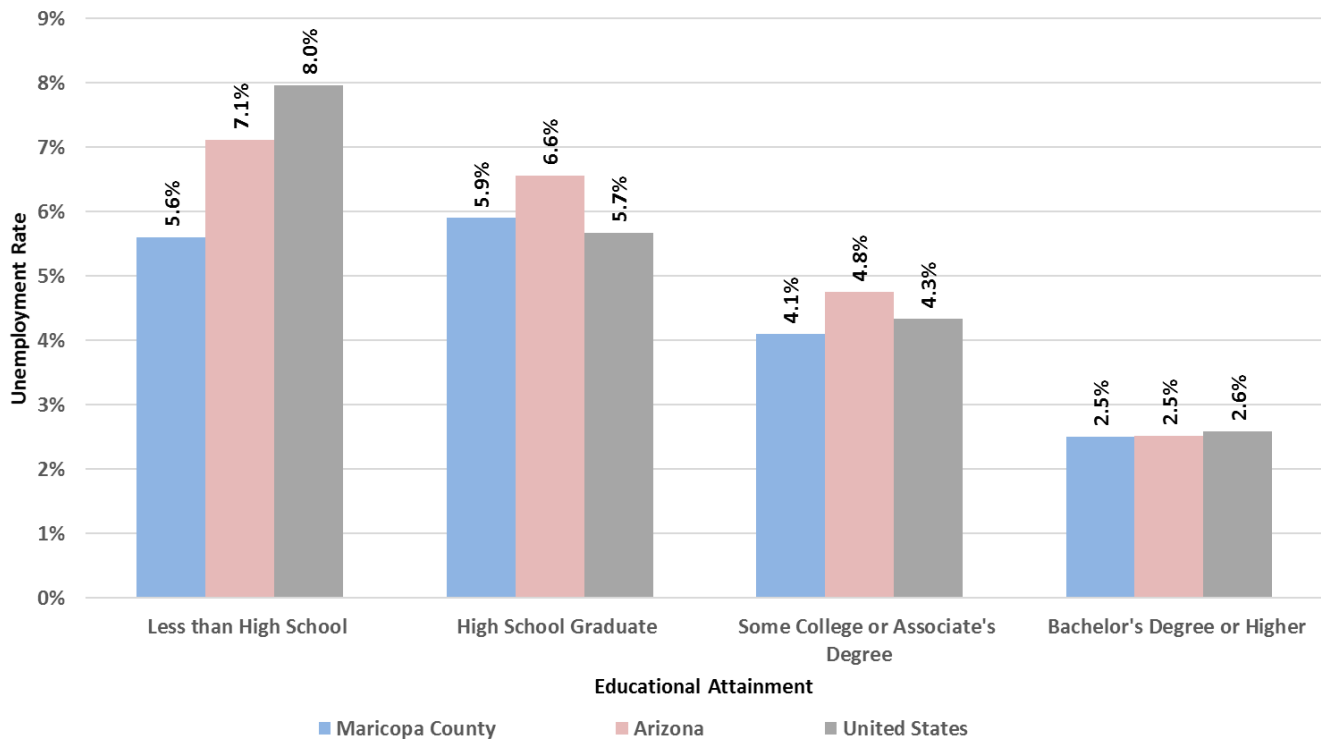
	Maricopa County	Arizona	United States
Less than High School	12.4%	12.8%	12.0%
High School Graduate (includes equivalency)	46.7%	49.1%	47.5%
Associate's Degree	8.7%	8.7%	8.5%
Bachelor's Degree	20.6%	18.3%	19.7%
Graduate or Professional Degree	11.7%	11.0%	12.3%
Source: Produced by the Arizona Office of Economic Opportunity using 2017 ACS 1-Year Estimates (S1501) in cooperation with the US Census Bureau			

Maricopa County's population has a similar proportion of individuals with a bachelor's degree or higher compared to the United States (32.3% and 32.0%, respectively). Over half (59.1%) of Maricopa County's population has a high school diploma or less than a high school diploma. This trend is about the same as the national average (59.5%). There are many different levels of educational attainment in Maricopa County.



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Unemployment Rate by Educational Attainment (Ages 25-64)



Source: Produced by the Arizona Office of Economic Opportunity using 2017 ACS 1-Year Estimates (B23006) in cooperation with the US Census Bureau

Unemployment rates for Maricopa County workers with less than a high school diploma are much lower than Arizona or United States unemployment rates for this educational cohort. In Maricopa County, workers without a high school diploma have a slightly lower rate of unemployment than their counterparts with a high school diploma. Maricopa County workers with postsecondary educational attainment tend to have similar rates of unemployment as their counterparts in Arizona or the United States.

While Maricopa County may have more favorable unemployment rates for workers with less formal education than the rest of Arizona, as educational attainment increases, unemployment decreases.



Maricopa County Public Assistance Households (2017)

	Maricopa County	Arizona	United States
TANF (Temporary Assistance for Needy Families)	1.3%	1.6%	2.3%
SSI (Supplemental Security Income)	3.6%	4.3%	5.3%
SNAP (Supplemental Nutrition Assistance Program)	8.9%	10.8%	11.7%
Medicaid/AHCCCS (Arizona Health Care Cost Containment System)	15.9%	17.4%	15.3%
Source: Produced by the Arizona Office of Economic Opportunity using 2017 ACS 1-Year Estimates (DP03, B27010) in cooperation with the US Census Bureau			

Chart note: TANF, SSI, and SNAP proportions are based on households, while Medicaid/AHCCCS proportions are based on individuals.

With the exception of Medicaid/AHCCCS, Maricopa County tends to have lower utilization of public assistance programs than the United States. The number of individuals in Maricopa County using Medicaid/AHCCCS is slightly higher than the rest of the United States, but it is somewhat lower than the rate throughout Arizona. Maricopa County's lower rate of poverty than Arizona could provide an explanation for lower rates of utilization of public assistance programs in Maricopa County compared to Arizona.



Maricopa County Health Insurance (2017)

	Maricopa County	Arizona	United States
Private Coverage Only (Employer, Direct-Purchase, TRICARE)	53.6%	49.1%	54.1%
Public Coverage Only (Medicare, AHCCCS, Veteran's Admin.)	22.1%	24.2%	20.9%
More than one source of health care coverage	13.9%	16.6%	16.3%
Uninsured	10.4%	10.1%	8.7%
Source: Produced by the Arizona Office of Economic Opportunity using 2017 ACS 1-Year Estimates (B27010) in cooperation with the US Census Bureau			

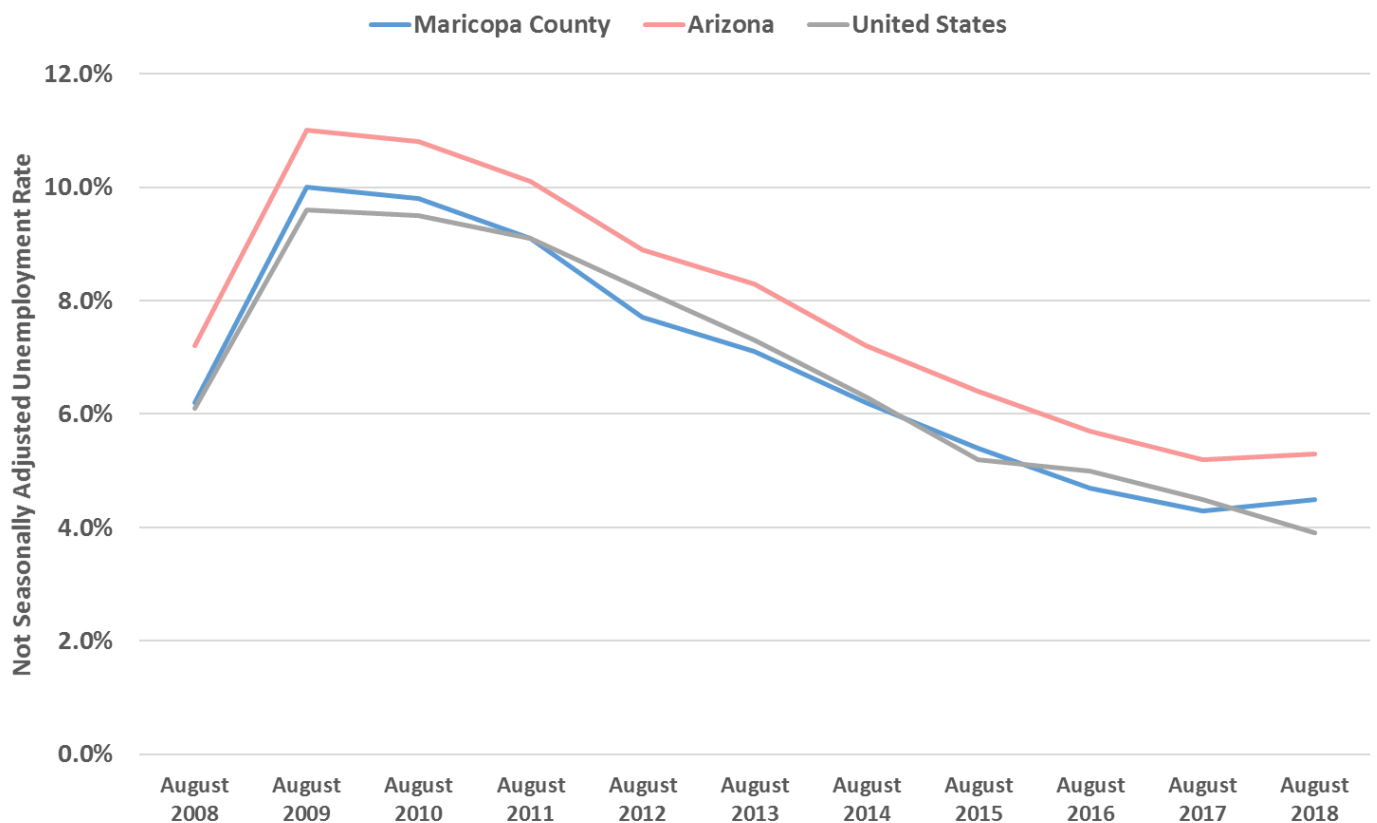
The sources of health coverage in Maricopa County predominantly follows the same patterns as all of Arizona. Maricopa County has a slightly higher rate of individuals without health insurance compared to Arizona. Compared to the United States, both Arizona and Maricopa County show a higher proportion of individuals receiving health insurance from a public entity.



August Unemployment Rate Comparisons

Maricopa County, Arizona, and United States

Historical Rates



Source: Office of Economic Opportunity in cooperation with the US Department of Labor, Bureau of Labor Statistics using Local Area Unemployment Statistics (LAUS)

In general, Maricopa County's unemployment rate has trended below the rate of Arizona. Maricopa County's unemployment rate is generally equivalent to the unemployment rate of the United States.



Maricopa County Industry Nonfarm Em- ployment Share

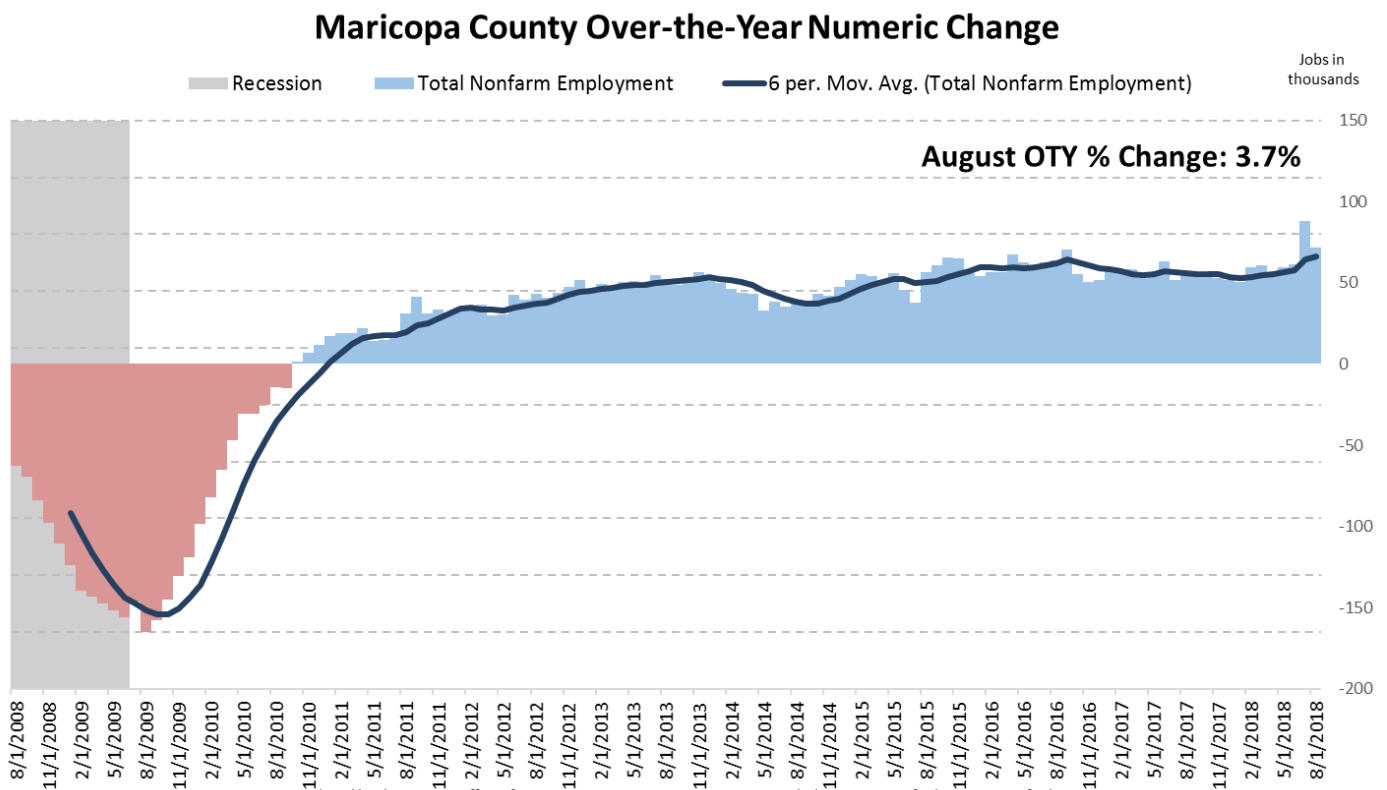
2001 and 2017 Annual Averages

Industry	Employment Share 2001	Employment Share 2017	Change
Education and Health Services	9.1%	15.3%	6.2%
Leisure and Hospitality	9.6%	11.0%	1.4%
Financial Activities	8.3%	9.4%	1.1%
Professional and Business Services	16.4%	17.2%	0.8%
Other Services	3.7%	3.2%	-0.5%
Information	2.6%	1.8%	-0.9%
Trade, Transportation, and Utilities	20.4%	19.4%	-0.9%
Government	12.1%	10.9%	-1.1%
Mining and Construction	8.2%	5.8%	-2.4%
Manufacturing	9.6%	6.1%	-3.6%
Total	100.0%	100.0%	0.0%
Source: Produced by the Arizona Office of Economic Opportunity using CES data in cooperation with the US Department. of Labor, Bureau of Labor Statistics			

Maricopa County's economy has changed in the 21st century. While total employment has grown, the distribution between industries has changed over time. Manufacturing employment has lost the most shares (-3.6%). It is followed by Mining and Construction (-2.4%) and Government (-1.1%). Generally, Mining and Construction is dominated by Construction. These sectors lost shares while employment in three sectors gained roughly equal shares: Education and Health Services (6.2%); Leisure and Hospitality (1.4%); and Financial Activities (1.1%). Generally, Education and Health Services is dominated by Health Services.



Maricopa County Nonfarm Employment Historical Over The Year Numeric Changes



Source: Office of Economic Opportunity in cooperation with the US Department of Labor, Bureau of Labor Statistics using Current Employment Statistics (CES)

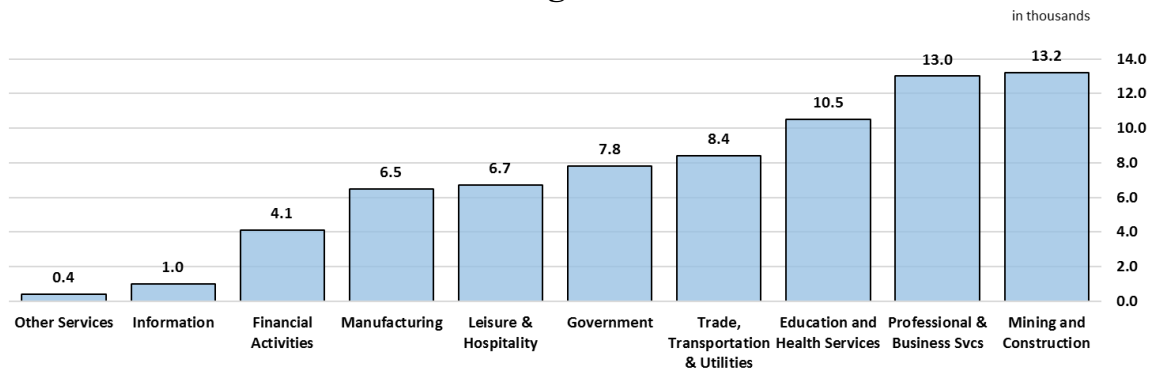
Maricopa County has reported consistent annual total nonfarm job growth since 2011. Currently, annual growth is exceeding 3.0%, which is a very robust growth rate.



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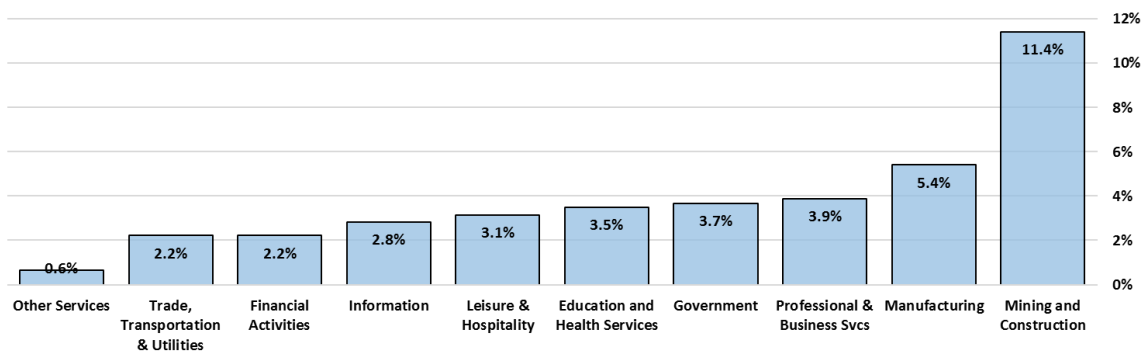
August 2018 Nonfarm Employment Report

Maricopa County Numeric Over-the-Year Employment Gain/Loss by Sector August 2018



Source: Office of Economic Opportunity in cooperation with the US Department of Labor, Bureau of Labor Statistics using Current Employment Statistics (CES)

Maricopa County Percentage Over-the-Year Employment Gain/Loss by Sector August 2018



Source: Office of Economic Opportunity in cooperation with the US Department of Labor, Bureau of Labor Statistics using Current Employment Statistics (CES)

In August of 2018, Maricopa County saw significant annual job growth in Mining and Construction; Professional and Business Services; and Education and Health Services. No sectors reported job decreases.

2017-2019 Maricopa County Industry Employment Projections

North American Industry Classification (NAICS)				2-Year Change	
Industry Code	Industry Title	2017	2019	Numeric	Percent
000000	Total All Industries	2,067,036	2,190,157	123,121	6.0%
000067	Self-Employed and Unpaid Family Workers, All Jobs	118,491	126,254	7,763	6.6%
000990	Unclassified Payroll Employment	16,572	17,003	431	2.6%
110000	Agriculture, Forestry, Fishing and Hunting	8,181	8,216	35	0.4%
210000	Mining	2,172	2,349	177	8.1%
220000	Utilities	15,744	16,206	462	2.9%
230000	Construction	110,360	123,606	13,246	12.0%
310000	Manufacturing	117,021	122,352	5,331	4.6%
420000	Wholesale Trade	76,562	78,201	1,639	2.1%
440000	Retail Trade	226,212	230,767	4,555	2.0%
480000	Transportation and Warehousing	65,812	71,378	5,566	8.5%
510000	Information	36,433	37,117	684	1.9%
520000	Finance and Insurance	136,804	148,561	11,757	8.6%
530000	Real Estate and Rental and Leasing	40,211	41,799	1,588	3.9%
540000	Professional, Scientific, and Technical Services	111,610	120,371	8,761	7.8%
550000	Management of Companies and Enterprises	28,491	29,563	1,072	3.8%
560000	Administrative and Support and Waste Management and Remediation Services	192,129	200,224	8,095	4.2%
610000	Educational Services	137,722	141,523	3,801	2.8%
620000	Health Care and Social Assistance	259,006	289,254	30,248	11.7%
710000	Arts, Entertainment, and Recreation	43,315	45,872	2,557	5.9%
720000	Accommodation and Food Services	183,990	195,719	11,729	6.4%
810000	Other Services (Except Government)	64,871	67,052	2,181	3.4%
900000	Government	75,327	76,770	1,443	1.9%

Arizona Office of Economic Opportunity 2017-2019 Industry Projections

Construction (12.0%); Health Care and Social Assistance (11.7%); Finance and Insurance (8.6%); Transportation and Warehousing (8.5%); and Mining (8.1%) are all projected to have growth rates that exceed 8.0% growth rates over the two year projection period. Health Care and Social Assistance (30,248 jobs); Construction (13,246 jobs); and Accommodation and Food Services (11,729 jobs) are projected to have the largest numeric increases in Maricopa County during the two year projection period.



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2017-2019 Projected Job Growth by Region

Area Name	2017 Estimated Total Employment Level	2019 Estimated Total Employment Level	2-year Numeric Growth	2-Year Annualized Percentage Growth
Arizona	2,933,968	3,086,936	152,968	2.6%
Coconino County	70,107	72,350	2,243	1.6%
Maricopa County	2,067,036	2,190,157	123,121	3.0%
Mohave and La Paz	59,173	61,573	2,400	2.0%
Northeastern Arizona	74,509	76,772	2,263	1.5%
Pima County	392,316	405,671	13,355	1.7%
Pinal County	66,356	69,239	2,883	2.1%
Santa Cruz County	15,080	15,156	76	0.3%
Southeastern Arizona	53,375	55,103	1,728	1.6%
Yavapai County	69,233	72,103	2,870	2.1%
Yuma County	66,281	68,306	2,025	1.5%

Arizona Office of Economic Opportunity 2017-2019 Industry Projections

The different regions in Arizona are projected to experience job growth during the projections period. Some are projected to grow faster than others, but the growth rates are projected to be positive.

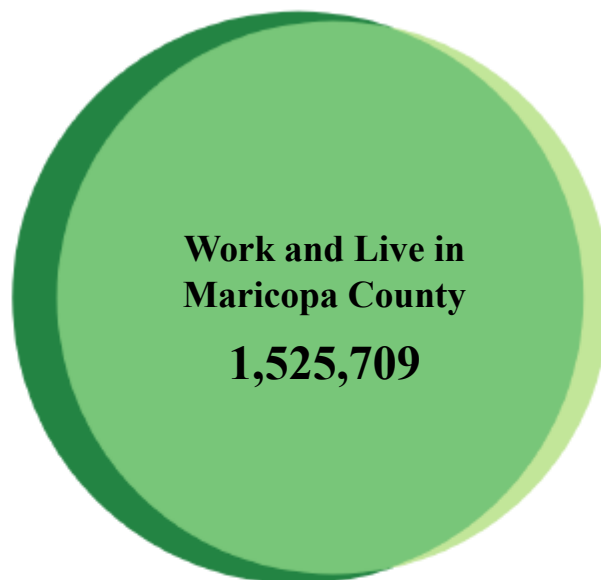


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Maricopa County Commuting Patterns

Maricopa County 2015

**Work in
Maricopa
County and
Live
Elsewhere
209,231**



**Live in
Maricopa
County and
Work
Elsewhere
93,303**

Source: Produced by the Arizona Office of Economic Opportunity using On The Map in cooperation with the US Census Bureau

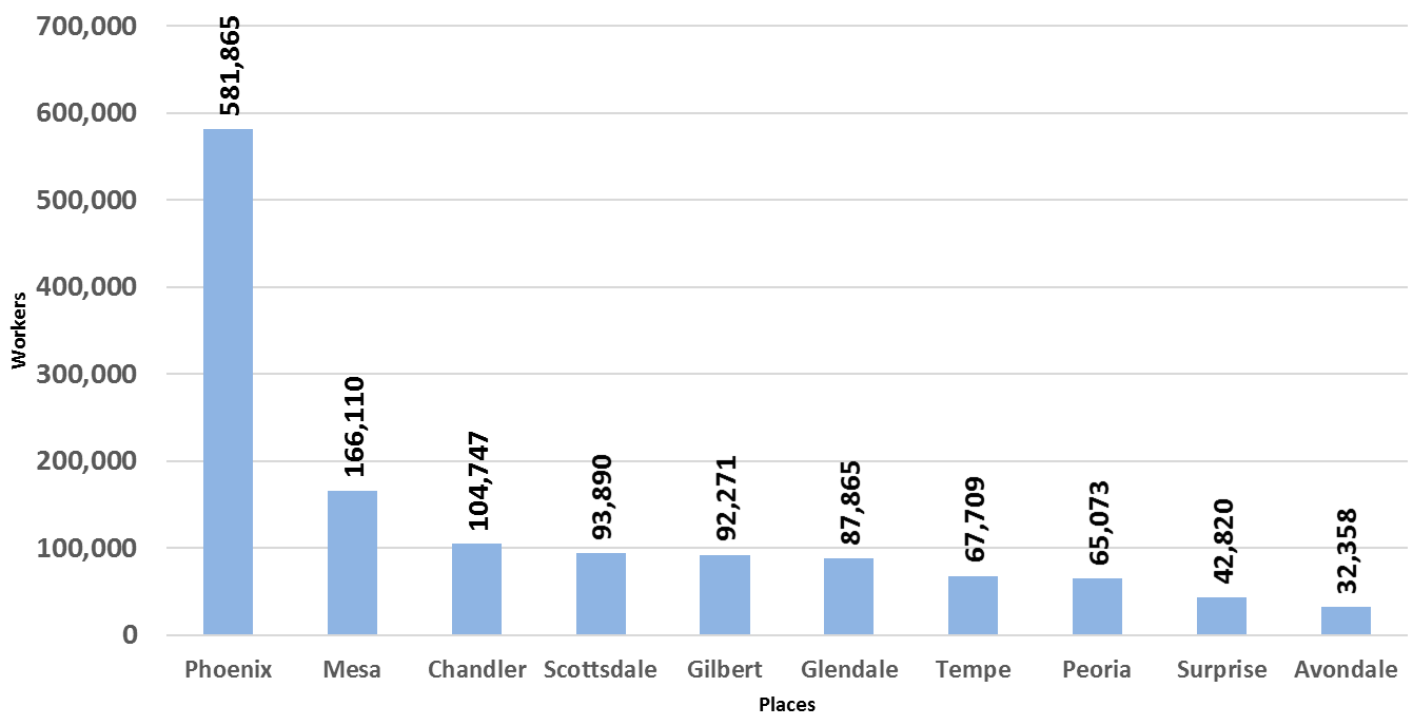
On The Map can provide information about commuting patterns for residents and workers within Maricopa County. Most workers in Maricopa County also live in Maricopa County, but there are both inflows and out-flows. Maricopa County has more workers coming into the area for work than leaving the area.

The dark green circle represents the population that works in Maricopa County (1,734,940 individuals). The light green circle represents the population that lives in Maricopa County (1,619,012 individuals). The area where the circles overlap represents the population that both lives and works within Maricopa County (1,525,709 individuals).



Top 10 Places of Residence for Maricopa County Workers

Maricopa County 2015



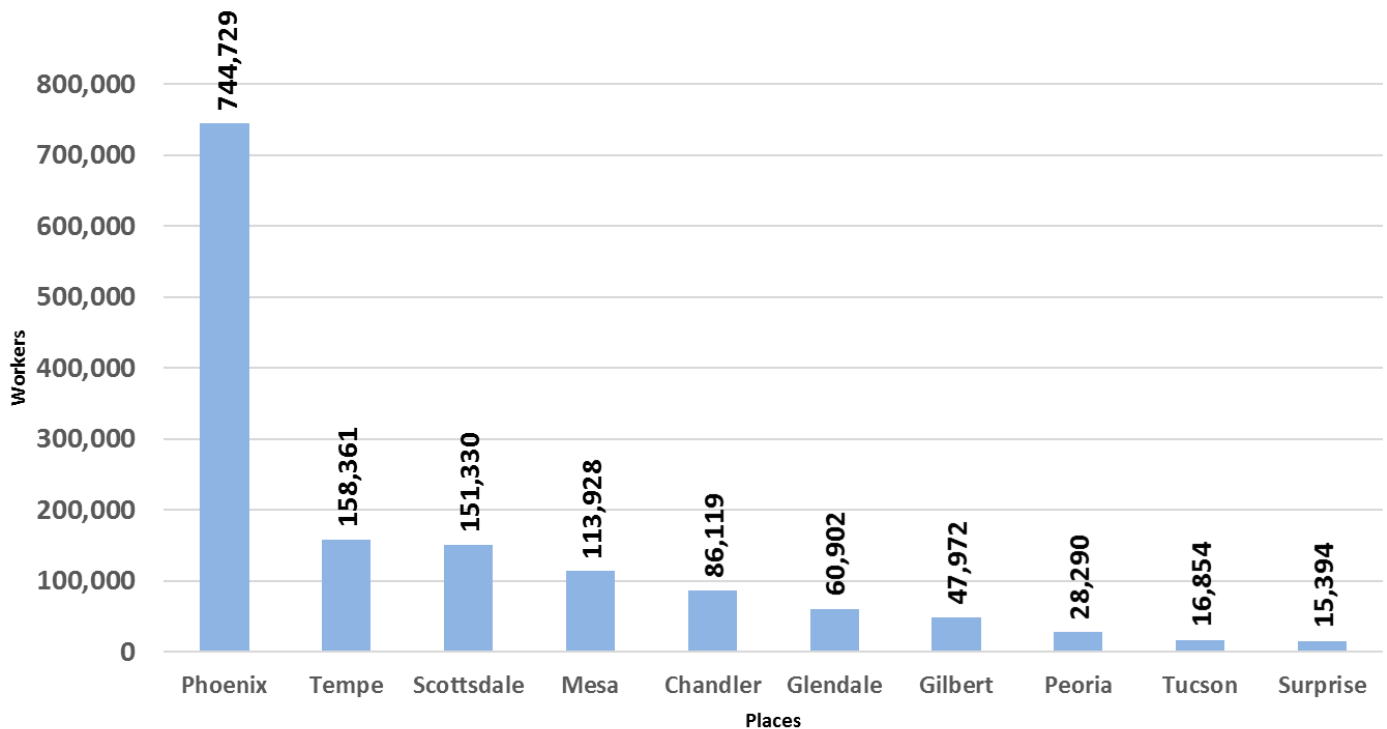
Source: Produced by the Arizona Office of Economic Opportunity using On The Map in cooperation with the US Census Bureau

Of the 1,734,940 individuals who work in Maricopa County, these are the top 10 places where these individuals live (dark green circle). Phoenix houses the largest proportion of Maricopa County workers relative to other places.



Top 10 Places of Employment for Maricopa County Residents

Maricopa County 2015



Source: Produced by the Arizona Office of Economic Opportunity using On The Map in cooperation with the US Census Bureau

Of the 1,619,012 individuals who live in Maricopa County, these are the top 10 places where these individuals work (light green circle). Phoenix is the top place for Maricopa County residents to work. 16,854 Maricopa County residents commute to Tucson, but the vast majority of Maricopa County residents also work within Maricopa County.



Data Sources

LaborStats.az.gov

Employment Data:

laborstats.az.gov/employment

Unemployment Data:

laborstats.az.gov/unemployment

Wage & Income Data:

laborstats.az.gov/wages-income

Employment Projections Data:

laborstats.az.gov/employment-forecasts

Population Data:

laborstats.az.gov/population

Other Labor Market Data Sources

Commuting Patterns Data:

On the Map: onthemap.ces.census.gov/

Demographics Data:

American Community Survey: census.gov/programs-surveys/acs/

Personal Income and State GDP Data:

US Bureau of Economic Analysis: bea.gov/regional/index.htm

Interactive Employment Mapping

Maricopa Association of Governments: <http://geo.azmag.gov/maps/azdemographics/>

Skills and Training Requirement Data:

O*NET: onetonline.org/find/descriptor/browse



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Contact Information

Website: <https://laborstats.az.gov>

Phone: 602.771.2222

Office Email: labor.info@azstats.gov

Doug Walls: doug.walls@oeo.az.gov

For information on the Office of Economic Opportunity's recommended In-Demand Occupations visit:

<https://tabsoft.co/2JsE6St>

Local Workforce Occupations

Instructions:
-Customize your list of occupations by selecting a local region, industry category and minimum education level
-Review employment and wage estimates associated with each occupation
-Occupations are assigned a rating from 1-5 calculated using wage, and numeric and percentage growth rates
-Hover over an occupation to highlight data elements on the graph below

Local Area

Arizona

Industry

Construction

Minimum Education Required

(All)

In-Demand Occupations

Occupation	Employment Level	Annualized Proj Occ Emp...	Annual Wages	Minimum Education Req.	
Carpenters	16,157	4.1%	\$42,990	HS Diploma	★★★★★
Cement masons and concrete finishers	6,476	5.4%	\$39,750	Less than H.S.	★★★★★
Construction laborers	22,852	4.0%	\$33,349	Less than H.S.	★★★★★
Cost estimators	5,724	4.5%	\$67,771	Bachelor's Degree	★★★★★
Drywall and ceiling tile installers	4,932	4.2%	\$40,032	Less than H.S.	★★★★★
Electricians	12,488	4.4%	\$49,181	HS Diploma	★★★★★
Heating, air conditioning, and refrigeration mechanics and installers	7,522	5.3%	\$46,444	Certification	★★★★★
Heavy and tractor-trailer truck drivers	27,205	3.5%	\$44,640	Certification	★★★★★

Wage & Employment



For information on
the Office of
Economic
Opportunity's
recommended
In-Demand
Industries visit:

[https://
tabsoft.co/2AE47vq](https://tabsoft.co/2AE47vq)

Tool Provides:

- ⇒ Custom Data Filters
- ⇒ Visual Comparisons
- ⇒ “Highlight” feature
- ⇒ Local employment data
- ⇒ Visualizes Sectors & Detailed Industries
- ⇒ Customer Support at (602)771-2222
- ⇒ labor.info@oeo.az.gov

Local Workforce Labor Market Information

Instructions:

- Select a local region below to get started
- Review employment and wage estimates to identify qualified in-demand industry sectors
- Hover over an industry to highlight data elements for that industry only
- In-demand industries that were calculated using the state’s methodology are highlighted in blue and are represented with the star symbol below

Local Area

Northeastern Arizona

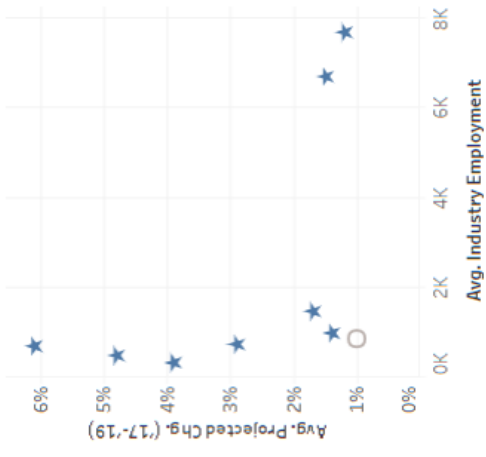
Industry Detail

Industry Sectors

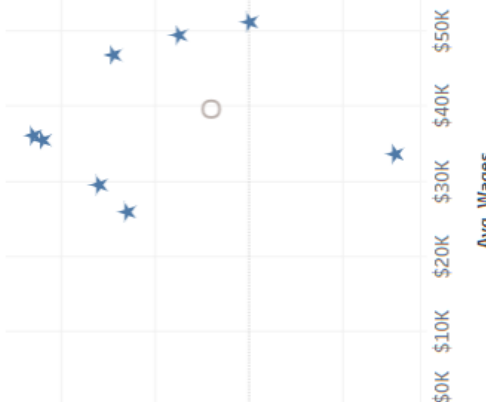
In-Demand Industries

Industry	Industry Rank	Employment Level	Projected Growth ('17-'19)	Average Wages	Wage Growth ('14-'17)
Health care and social assistance	1	7,695	1.2%	\$46,904	2.9%
Retail trade	2	6,707	1.5%	\$25,965	2.6%
Agriculture, forestry, fishing and hunting	3	492	4.8%	\$33,696	-3.1%
Professional and technical services	4	702	6.1%	\$49,539	1.5%
Administrative and waste services	5	991	1.4%	\$36,140	4.6%
Arts, entertainment, and recreation	6	333	3.9%	\$29,562	3.2%
Manufacturing	7	1,476	1.7%	\$51,289	0.0%
Real estate and rental and leasing	8	742	2.9%	\$35,533	4.4%
Transportation and warehousing	9	868	1.0%	\$39,693	0.8%

Employment



Wages



Industry Concentration

